

# RESEARCH STRATEGIES FOR ORGANIZATIONAL HISTORY: A DIALOGUE BETWEEN HISTORICAL THEORY AND ORGANIZATION THEORY

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## Abstract

If history matters for organization theory then we need greater reflexivity regarding the epistemological problem of representing the past; otherwise history might be seen as merely a repository of ready-made data. To facilitate this reflexivity, we set out three epistemological dualisms to explain the relationship between history and organization theory: (1) in the dualism of *explanation*, organization theorists subordinate narrative to analysis whereas historians are preoccupied with narrative construction; (2) in the dualism of *evidence* organization theorists prefer constructed data whereas historians use verifiable documentary sources; and (3) in the dualism of *temporality*, organization theorists treat time as constant for chronology whereas historians construct their own periodization. These three dualisms underpin our explication of four alternative research strategies for organizational history: *corporate history*, consisting of a holistic, objectivist narrative of a corporate entity; *analytically structured history*, narrating theoretically conceptualized structures and events; *serial history*, using replicable techniques to analyze repeatable facts; and *ethnographic history*, reading documentary sources “against the grain.” Ultimately, we argue that our epistemological dualisms will enable organization theorists to justify their theoretical stance in relation to a range of research strategies in organizational history, including narratives constructed from documentary sources found in organizational archives.

## Keywords

Organizational History, Historiography, Organization Theory, Ethnography, Narrative.

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## **RESEARCH STRATEGIES FOR ORGANIZATIONAL HISTORY: TOWARDS A DIALOGUE BETWEEN HISTORICAL THEORY AND ORGANIZATION THEORY**

Organization theorists increasingly agree that “history matters,” both for understanding ourselves (Brown & Härtel, 2011) and organizations (Sydow, Schreyögg, & Koch, 2009). New institutionalists in particular have continually affirmed the importance of history for understanding organizations (Tolbert & Zucker, 1983: 36). But even new institutionalism has a tendency to become ahistorical (Suddaby, Foster, & Mills, 2013). Organization theory tends to share the general social scientific skepticism towards archival narrative history (Sewell, 2005: 225). It has even been suggested that consulting organizational archives is “not properly a method of empirical organizational research because data and information are collected, rather than being directly generated in the course of the organizational research” (Strati, 2000: 133-134). Or else history is regarded as prosaic storytelling, with the implication that we can relax our critical, skeptical faculties when reading history (Down, 2001), and historical narratives can simply be incorporated to illustrate theoretical arguments.

Organization theorists have yet to acknowledge the implications from historiography, as “the writing of history and the study of historical writing,” that there are many different kinds of history (Jordanova, 2006: 228). The “historic turn” (Jordanova, 2006: 63; McDonald, 1996; Sewell, 2005: 81-82), has opened a dialogue between the humanities and wider social sciences, including organization theory (Booth & Rowlinson, 2006; Clark & Rowlinson, 2004; Wadhwani & Bucheli, 2013; Zald, 1996). But, to paraphrase Hayden White (1987: 164), a leading philosopher of history, if we are going to turn to history, we need to have a clear idea of the kind of history we mean, and whether it can accommodate organization theory. According to White (1987: 164) “the function of theory is to justify a notion of plausibility.” Therefore, we need a theoretical stance that can justify the plausibility of any history we construct from historical

sources; otherwise, the possibility for a conversation with historical theory will be precluded by a “common sense” definition of organizational history. Without a theoretical stance, organization theorists may be seen as unwelcome tourists, “wandering around the streets of the past” (White, 1987: 164) looking for a set of data. Or as Kuhn (1970: 1) put it, history needs to be seen as more than merely a repository for “anecdote and chronology.”

In order to reflect on what we mean by “organizational history” we need to have a better idea of the varieties of history that are feasible for organizational research and writing. Philosophers of history have highlighted the variety of history as a response to what Paul Ricoeur calls the epistemological “problematic of the representation of the past” (Ricoeur, 2004: xvi). According to Chris Lorenz (2011) the epistemological problems for history mainly concern the status of narrative, the nature of evidence, and the treatment of time. Responding to this problematic, in the first part of our article, we propose three epistemological dualisms; that is, different ways of “knowing” the past that tend to differentiate historians from organization theorists. These dualisms explain the reluctance of organization theorists to research and write narrative history derived from primary documentary sources found in organizational archives.

In the dualism of *explanation*, historians are preoccupied with the epistemological problems of narrative construction, whereas organization theory subordinates narrative to analysis. In the dualism of *evidence*, narrative history is derived from eclectic but verifiable documentary sources, whereas organization theorists prefer data constructed from replicable procedures. And in the dualism of *temporality* historians continually construct periodization from sources and historical contexts, whereas organization theorists tend to treat time as constant, or else import periodization as given from historiography. These dualisms provide a heuristic template for assessing alternative strategies for historical research and writing.

In the second part of the article we use our epistemological dualisms to identify and analyze four alternative strategies for research and writing organizational history derived from organizational archives: *corporate history*, consisting of a holistic, objectivist narrative of a named corporate entity; *analytically structured history*, in which conceptually defined structures and events are narrated, such as Chandler's (1962) accounts of structural reorganization; *serial history*, using replicable techniques to analyze repeatable facts; and finally *ethnographic history*, derived from reading sources "against the grain" in order to recover practices and meanings from organizations. These four strategies illustrate the variety of research that is feasible using historical sources generated by organizations themselves. This serves to counter what we see as the reluctance to use "organizational archives" in organization studies, which is not to say that organizational history can only be written using such archives. Indeed, we feel that organizational archives are not only under-utilized for constructing data in organization studies, as documentary sources they also represent forms of evidence that remain largely unexplained by organization theory.

This article thus contributes to organization theory by identifying a range of theoretical stances in relation to organizational history. We also set out the epistemological problems that organization theorists need to consider when deciding how to construct, incorporate, or analyze historical narratives derived from archival sources. From our epistemological dualisms organization theorists will be able to articulate why it is that history matters, and from our research strategies for organizational history, they will be able to answer the questions: "What kind of history am I writing?" or, "What kind of history am I reading?"

## **HISTORICAL THEORY AND ORGANIZATION THEORY**

There have been repeated calls for more history in management education (Cummings & Bridgman, 2011; Madansky, 2008; Smith, 2007; Van Fleet & Wren, 2005) and a historical

perspective in organization theory (Aldrich, 1999; Bucheli & Wadhwani, 2013; Kieser, 1994; Üsdiken & Kieser, 2004; Zald, 1993). Stager Jacques (2006: 44) has argued that “historically informed theorizing” requires a more rigorous approach to historical methodology. But historiography has yet to receive the same systematic analysis in organization theory as, for example, theorizing from case studies (Eisenhardt, 1989), process (Langley, 1999), or narrative data (Pentland, 1999), and other interpretive approaches (Prasad & Prasad, 2002). While these approaches occasionally incorporate historical data from organizational archives, they remain skeptical towards historical narratives and are not predicated on the kind of dialogue with historical theory that we propose.

We cannot look to practicing historians for a guide to historically informed theorizing in the same way that we might look to practitioners in other disciplines. History in general is more “craftlike” than the social sciences, which means that explicit theoretical or methodological statements are not necessarily required for historical writing (White, 1995: 243), especially for narrative history. There is indeed a longstanding “resistance to theory” from practicing historians (Lorenz, 2011: 15-16; Fulbrook, 2002: 25). But in the relatively separate field of historical theory the implicit theoretical assumptions that underpin the “craft” of history have been explicated, either to provide legitimation for accepted historiographical practice or to critique it (e.g.: Clark, 2004; Jordanova, 2006; Lorenz, 2011: 15).

From the outset, we recognize that dualism is implicit in history. According to Hegel, “the term *History* unites the objective with the subjective side ... it comprehends not less what has *happened*, than the *narration* of what has happened.” (Hegel, 1956; quoted in White, 1987: 11-12). It is generally accepted, therefore, that history covers: “(1) the totality of past human actions, and (2) the narrative or account we construct of them now” (Walsh, 1967: 16; quoted in Callinicos, 1995: 4; see also Sewell, 2005: 327). As a result of this “double meaning” a

distinction can be made between ontological theories that refer to “*history as an object*,” and epistemological theories concerned with “knowledge of that object” (Lorenz, 2011: 20). Organization theorists tend to assume that a theory of history refers to the ontology of history, whereas historical theorists are generally more concerned with the implications of historical epistemology. So to say that “history matters” in organization theory usually means that past human actions are seen as ontologically significant for path dependence (e.g. Sydow et al., 2009). Equally it could be said that “history matters” epistemologically for understanding how the past can be known or represented, either directly through organizational research and writing, or through historiography.

Previous proposals for historical research in organization studies (Goodman & Kruger, 1988; Kieser, 1994; Lawrence, 1984) have been predicated on a definitive, unitary statement of historical method. But we maintain that alternative strategies for research and writing organizational history need to be located in relation to the range of ontological, epistemological, and methodological assumptions identified by historical theory (Lorenz, 2011). As a starting point our three epistemological dualisms locate organization theory in relation to historiography.

### **Dualism 1: Explanation (Narrative and Analysis)**

The renewed interest in history from new institutionalists (Suddaby et al., 2013; Suddaby, Foster, & Trank, 2010; Rowlinson & Hassard, 2013) is associated with increasing attention to actors and agency in institutional work (Lawrence, Suddaby, & Leca, 2009) and in institutional logics (Thornton, Ocasio, & Lounsbury, 2012). New institutionalists recognize the difficulty of restoring a role for actors and agency without reverting to “powerful, heroic figures” who can transcend institutional constraints (Lawrence et al., 2009: 3). Similarly, theoretically oriented historians and sociologists, following a self-conscious logic that posits “intentionality, contingency, and meaningful human action” (Lorenz, 2011: 21), are mindful that they risk

licensing a resurrection of the “great man” theory of history (Sewell, 2005: 316). This is the unstated default theory for most historians who claim they “have no time for theory” (Fulbrook, 2002: 125). A shift of emphasis from structure to agency is associated with a return to narrative in historiography (Stone, 1979; Fulbrook, 2002: 53), although historians recognize that theoretically informed history is supposed to “avoid narrative” in favor of “thematic analysis” (Evans, 1997: 152).

Following the example of Giddens (1984: 355-363) in historical sociology, a convergence in relation to the dualism of action and structure could be held as evidence that there is no logical or methodological schism between organization theory and history: organization studies are, or can be, historical, and vice versa, and therefore organizational history simply refers to a unified field. However from the historians’ side it would be difficult to see such a synthesis as anything but another imperialistic incursion into history (Evans, 1997: 182). Furthermore the ontological dualism of action and structure should not be conflated with the epistemological dualism of narrative and analysis in explanation, not least because according to Ricoeur (1990: 197) structural history often turns out to be a narrative of quasi-characters such as nations, classes, or organizations intentionally pursuing their own interests.

The objections to narrative construction have been rehearsed by historical theorists such as Allan Megill, who argues that the “scientific form of anti-narrativism” prevalent in social science insists on “the language of law and theory, not the language of narrative” (Megill, 2007: 68-69; Sewell, 2005: 225). Whether or not organization theory can be characterized as anti-narrativist, major organizational research programs, such as organizational ecology, are “formally *probabilistic*” (Hannan & Freeman, 1989: 40), and mostly expressed in a theoretical rather than narrative form. This is not to say that narrative and probabilistic reasoning are mutually exclusive, since they can offer complementary accounts of the same phenomenon (Megill, 2007: 126).



Popper (2002[1957]: 133) argued that history is concerned with “the causal explanation of a *singular* event,” whereas for “theoretical sciences, such causal explanations are mainly means to a different end — the testing of universal laws.” Similarly, but from a completely different historical perspective, the classicist Paul Veyne (1984: 3) asserts that we can treat a fact as an event, “because we judge it to be interesting,” or we can look for its “repeatable nature” as a “pretext for discovering a law.” In organization theory, narrative explanations of singular historical events are usually seen as stepping stones towards the development of generalizable theories (c.f. Eisenhardt, 1989; Langley, 1999), and even supposedly idiographic case studies are seen as a vehicle for identifying “generative mechanisms” (Tsoukas, 1989). Popper (2002[1957]: 90), of course, was clear that the “method of generalization” holds little interest outside of theoretical sciences, and it is not the kind of history he wished to write. But that does not preclude the use of general theories in the construction of narratives to explain singular events. There is no reason why theories of organization, such as new institutionalism, should not be promoted more widely for constructing narrative organizational histories.

Narrative history also faces what philosophers of history call the “impositionalist objection,” according to which “recounting the past in the form of a story inevitably imposes a false narrative structure upon it” (Norman, 1998: 156; see also Carr, 1998). The resistance to writing up qualitative social science research in a narrative form (Riessman, 2011: 314) derives from the impositionalist objection to narrative. Martin (1992: 25), for example, consciously “avoids narrative structure and other forms of textual seduction” in her writing. Taking more account of agency and meaning in organization theory, as in new institutionalism, has led to increasing recognition that narratives are amenable to deconstruction (Boje, 1995) or analysis as data (Barry & Elmes, 1997; Hardy & Maguire, 2010; Lawrence & Suddaby, 2006: 240; Pentland, 1999). Organization theorists also recognize the ontological status of narrative as

constituting objects, or “artifacts” (Venkataraman, Sarasvathy, Dew, & Forster, 2013), that “enable and constrain” individuals and organizations (Pentland, 1999: 721). But since narrative *analysis* takes stories as the “object of investigation” (Riessman, 1993: 1), it has, if anything, reinforced the impositionist objection to narrative *construction* in organization theory.

Unfortunately the default position for craft historians can be characterized as a form of objectivism, or “historical realism,” where history is seen as an “untold story” that exists independently and prior to being discovered and told by the historian (Norman, 1998: 155). Peter Novick’s acclaimed history of objectivity in the American historical profession starts with an outline of “objectivism,” rather than objectivity itself. Objectivism consists of “a commitment to the reality of the past, and to truth as correspondence to that reality; a sharp separation between knower and known, between fact and value, and, above all, between history and fiction.” Objectivists assume that historical facts exist “prior to and independent of interpretation,” and “Whatever patterns exist in history are ‘found,’ not ‘made’” (Novick, 1988: 1-2). Objectivist history is clearly inimical to the kind of reflexivity that would be required to counter the impositionist objection to narrative through a self-conscious account of the theoretical and methodological assumptions that underpin its own narrative construction. Objectivism therefore provides a convenient straw-man for critics of historical practice (e.g. Barrett & Srivasta, 1991; Munslow, 2012), and objectivist history unwittingly supplies the kind of narrative that is amenable to analysis as “rhetorical history” (Suddaby et al., 2010).

Organization theorists (Hardy & Maguire, 2010: 1368) and historical theorists (Fulbrook, 2002), share a minimal definition of narrative, derived from narrative theory (Coble, 2001), as a sequence of logically and chronologically related events organized by a coherent plot. This does not mean that events have to be presented in chronological order, and a simple chronological sequence of events is often seen as insufficient to constitute a narrative, being described as a

“chronicle” (White, 1987: 17) or “a story without a plot” (Czarniawska, 1999: 63). If the story consists of all the events depicted, and the plot is the chain of causation which links them (Coble, 2001: 5), then the question for historical narratives is whether either or both the story or the plot are found or imposed. Historical theorists have focused on “emplotment” in historical narratives, with the plot determining the selection of “facts” and the construction of events from the archives, and an acceptance that the same “historical facts” can be emplotted in different forms of narrative (Fulbrook, 2002: 8).

Narrative history is also criticized for being excessively descriptive (Megill, 2007: 86), or having too much story and not enough plot (Czarniawska, 1999: 69). Langley (1999: 697), for example, acknowledges the value of narrative for capturing the richness of a context, but argues that research needs to “offer more explicit theoretical interpretations.” She therefore cautions against reliance on narrative in organizational research, because “an idiosyncratic story” makes for “a rather thin conceptual contribution.” Furthermore, Langley (1999: 697) maintains, the most interesting narratives are not “purely descriptive. They know where they are going.”

Megill (2007: 86-87) attributes the “debasement of ‘description’” to “hermeneutic naïveté,” which ignores “the hermeneutic insight that all perception is perspectival.” Organization theorists share the social scientific consensus that “data are not theory” because theory requires “causal arguments” (Sutton & Staw, 1995: 374; Weick, 1995: 387). Against this Megill (2007: 87) argues that “every ‘description’ is already permeated by ‘theory.’” In particular “thick description” of “a context” (Geertz, 1973: 14), purged of plot, represents a form of analysis in its own right, even if it deliberately lacks causal argument. From a self-consciously “angular perspective” (Megill, 2007: 110-111), such as Foucault’s (1977), pure description can be seen as theoretical. It is also worth noting that Weber’s (2009) ideal types largely consist of conceptual descriptions rather than causal arguments (Megill, 2007: 233 note 13). Delbridge and

Fiss (2013) have made a case for alternative “styles of theorizing,” which means that historical typologies, such as Weber’s ideal types, as well as clearly articulated perspectives for description in organizational history, are more likely to be recognized as theory.

Whereas a narrative usually consists of a beginning, middle, and end, if not necessarily in that order, analysis lends itself to the form of a social science article (i.e. introduction; theory; methods; findings; conclusion), where the theory section may be presented as a narrative (DiMaggio, 1995), but not the findings. The “analytic narratives” proposed by rational choice theorists (Bates, Greif, Levi, Rosenthal, & Weingast, 1998; Pedriana, 2005), and other forms of “narrative positivism” (Abbott, 1992), tend to present attenuated narratives, often derived from narrative analysis, and generally lack the literary features we usually expect from narrative, such as suspense (Carpenter, 2000; Sewell, 2005: 262-270). The difficulty with making the mode of emplotment explicit in narrative history is that in literature the reader usually infers the plot. Spelling out the plot in the theory or methods sections of an article, or subordinating it to rigorous logic, risks undermining the literary form of a narrative, rather like a comedian trying to explain why a joke is funny before actually telling the joke.

## **Dualism 2: Evidence (Sources and Data)**

Along with an aversion to historical description, qualitative organizational researchers are also wary of using “historical data.” Again we can take the example of Langley, who sees “current data collected in real time” as “richer and finer grained” than “historical data collected through the analysis of documents and retrospective interviews,” which she characterizes as “sparse and synthetic, focusing on memorable moments and broad trends,” and only to be used out of necessity in combination with current data (Langley, 1999: 693). This is understandable insofar as Langley (1999: 691) associates historical data with “course-grained longitudinal time series.” We find that “archival data” is referred to as an alternative to “qualitative research”

(Shipilov, 2009: 93), and “retrospective” organizational research using “historical data” is assumed to be quantitative (Denrell & Kovacs, 2008), so much so that quantitative longitudinal studies are seen as synonymous with history in organization theory (Kipping & Üsdiken, 2008). Quantitative researchers appear to be more comfortable using historical sources as secondary data, whereas qualitative researchers clearly prefer primary data that they have constructed themselves (Strati, 2000). The qualitative objections to using historical data therefore provide our focus for exploring the dualism of sources and data as evidence.

The terms “sources” and “data” are often used interchangeably, but we can make a distinction between them because it is clear that organization theorists prefer what they call primary data over secondary, or historical data, whereas historians prefer primary to secondary sources. The organization theorist’s secondary, or historical data, correspond to the historian’s primary sources, and the terminological difference is not purely semantic as it reveals a deeper epistemological dualism in relation to the treatment of evidence and the notion of what constitutes a cumulative contribution to knowledge.

We can explore the reservations regarding archival data in organization studies further, given that with the renewed interest in history from new institutionalism (Suddaby et al., 2013) organization theorists have made occasional forays into archival historical sources for qualitative research. But as Rojas (2010) illustrates, when “organizational archives” are consulted their “disadvantages” have to be rehearsed in a way that would not be expected, say, for interviews: first, “organizations vary in what is saved and when it is saved”; second, “archives tend to be rich in documents from leaders, but they have fewer materials about other actors”; and third, “actors can selectively record what transpires in an organization. Meeting minutes, for example, may address only major points and omit important contextualizing discussions.” As a result, it is

argued, “archival sources should be supplemented, when possible, with newspaper accounts, interviews, memoirs, and other materials” (Rojas, 2010: 1268).

Organization theorists appear to believe that the “validity and reliability” of documentary archival sources must be questioned more than constructed data, such as interview transcripts (Strati, 2000: 159). As a result even when they are used, archival sources are cited sparingly (e.g. Rojas, 2010), and generally relegated to providing “background information about an organization” (Strati, 2000: 158), or validating retrospective accounts (Golden, 1997), as in most case studies (Eisenhardt, 1989; e.g. Smets, Morris, & Greenwood, 2012).

Historians are more likely to rehearse the argument that, when possible, interviews should be supplemented with documentary research: “Without extensive research in corporate records it is all too easy to accept one’s informants’ statements at face value ... Documentary research provides an excellent means to test the accuracy of different images and perceptions of the organization and to compare espoused and actual values” (Dellheim, 1986: 20). But more importantly, history is equated with the use of primary sources, produced at the time of the events being researched (Jordanova, 2006: 95), which means that the more contemporaneous a source is with the past in question, the higher its value for historians (Alvesson & Sköldbberg, 2000: 74). Even if the distinction between primary and secondary sources is difficult to justify at a theoretical level, it is indispensable as a “*methodological rule of thumb*” (Megill, 2007: 50). For historians retrospective interviews count as “testimony,” which is notoriously unreliable and almost by definition cannot constitute a primary source, especially when it is collected years later (Megill, 2007: 20,50). Historians therefore have a strong preference for “nonintentional evidence,” by which they mean “anything remaining from the past that was not made with the intention of revealing the past to us, but simply emerged as part of normal life” (Megill, 2007: 25,29; Howell & Prevenier, 2001).

Since historians cannot directly observe the past, they have to reconstruct it, mainly from documentary sources (Callinicos, 1995: 65). It could be argued that organizational history is no different from other sub-fields in organization theory where constructs are not directly observable. However, constructs can be inferred from observations generated in the present, such as responses to questions. Historians are dependent on the observations that historical actors have made and which subsequently find their way into the archives. With the exception of oral history, which mainly concerns the recent past, history stands apart from social science, because historians cannot *produce* evidence; instead, they have to *find* it (Megill, 2005: 456).

From an epistemological point of view, historians can be seen as “*explaining present evidence*” (Megill, 2005: 454); constructing an account of the past that can best explain the sources that have been found so far, rather than explaining the past through the sources (Megill, 2007: 246 note 15). From an historical perspective, then, the problem is not so much how to generate theory from organizational archives, but how to generate narratives or theories that can explain the sources found in organizational archives. As part of the explanation for the extensive archives held by so many organizations, often tended by highly qualified archivists, we need to understand what the philosopher of history, Michel de Certeau (1988), called the “historiographical operation.” In the context of organizations this refers to the process whereby the bureaucratic files are set aside and transformed into historical “documents”; or as an archivist might say, certain “records” are selected for preservation as “archives.”

As Alvesson and Sköldbberg (2000: 69) point out, organization theorists have largely ignored “source criticism,” which constitutes a rigorous method for interpreting sources; one that counters the skepticism towards organizational archives. Source criticism distinguishes between social “documents” and narrative or literary “texts” (Howell & Prevenier, 2001: 20-21). As record-keeping bureaucracies, organizations produce social documents, such as board

minutes and personnel records, as well as narrative texts such as annual reports and in-house magazines, which can be used to examine organizational phenomena such as culture and change (e.g. Mills, 2006; Neimark, 1992). Yates's (1989) historical account of communication in American management from 1850 to 1920 represents an innovative explanation for the form of evidence found in organizational archives.

Historians are also used to reading sources “against the grain” (Clark, 2004: 126; Evans, 1997: 143; Gunn, 2006: 169), inferring a meaning beyond, or even opposed to, what the sources were intended to mean. Even testimony can be “made to reveal what it doesn't itself say” (Dray, 1986: 34). As Ginzburg explains in the preface to his celebrated study of sixteenth-century Italian popular culture: “The fact that a source is not ‘objective’ ... does not mean that it is useless. A hostile chronicle can furnish precious testimony about a peasant community in revolt” (Ginzburg, 1992[1976]: xvii). Prohibition can be taken as evidence of practice. Or as Boje (2008: 24) puts it, all texts can be read as “an answer to something,” with the aim of recovering what the text was an answer to. So when we read in the Bible that Timothy would “suffer not a woman to teach, nor to usurp authority over the man, but to be in silence,” an historian of Christianity assumes that there must have been women who were anything but silent (MacCulloch, 2010: 120). Since we can no longer hear their side of the argument, we have to reconstruct it from those who silenced them. As the post-colonial theorist, Gayatri Chakravorty Spivak (1988), has argued, partly on the basis of her research in the archive of the East India Company, if the subaltern presence in history is to be recovered then the silence of the archives needs to be recognized — what the sources do not say may be as important as what they do say (Decker, 2013).

The objections to using organizational archives can be attributed to confusion over the nature of sources and how they can be read. Most primary documentary sources bear little



resemblance to narrative literary texts (Evans, 1997: 111). But qualitative organizational researchers seem to assume that historical sources mainly consist of published narrative texts, such as books, magazines, and newspapers (Denzin & Lincoln, 2000). Historical research is then equated with a detailed analysis of a sample of these narrative texts (e.g.: Arndt & Bigelow, 2005; Shenhav & Weitz, 2000), which can be treated as if they are constructed data, such as interview transcripts. When historians refer to archival sources, they usually mean the unique, non-circulating social documents that they have diligently *found*, often in an archive which can only be consulted at a particular location by special permission (Hill, 1993: 22-23).

Organization theorists may argue that organizational archives are “collected, processed and expounded according to the organization’s criteria and for the purposes of social legitimation” (Strati, 2000). However this objection applies more to the narrative texts preferred by organization theorists rather than the “nonintentional” social documents produced in the process of running an organization. We cannot say that social documents are always more valuable than narrative sources (c.f. Alvesson & Sköldberg, 2000: 74). Nevertheless we can say that a narrative constructed in the first instance from primary social documents, such as the minutes of meetings and their accompanying files, is less susceptible to incorporating a narrative *from* the past as if it is an original historical narrative *of* the past. Narrative historical sources themselves are emplotted, that is they tell a story (Zieman & Dobson, 2009: 10), and therefore it is difficult to avoid the problem of “*narrative contagion*” (Alvesson & Sköldberg, 2009: 115), whereby the plot from narrative sources is imported into the construction of a historical narrative. On the other hand narrative sources, such as periodicals, are more amenable to the replicable procedures of narrative analysis (e.g. Shenhav, 1995, 1999) than social documents. Whether qualitative or quantitative, the use of coding and content analysis objectifies sources as

data and represents an epistemological attempt to ground historical interpretation in a systematic analysis of selected texts (Scott, 1990: 32).

Given that epistemologically historians are “explaining the evidence,” it follows that they are obliged to put their evidence and reasoning “on the table” (Megill, 2007: 124), and they do this by following the “rules of verification” (Evans, 1997: 127). Unfortunately, as historical theorists admit, these rules are “unexplicated” (Fulbrook, 2002: 186), but they are usually manifest in the copious footnotes that characterize historical writing (Hexter, 1998). Historical theorists generally reject the argument that these are merely “rhetorical devices,” designed to give history a spurious “reality effect” (Fulbrook, 2002: 56). Historians maintain that detailed citations “really do enable the reader to check the sources on which a historian’s statement is made and to whether or not they support it” (Evans, 1997: 127). They are a hallmark of accepted practices for historical writing, rather than an actual method for conducting research. Nevertheless we must remember that verification of sources does not constitute validation of a narrative (Wertsch, 2011: 26), which requires further epistemological reasoning.

Historians appear to see historical theory and methodology as being analogous to the plumbing in a building, where the form should conceal its function (Gaddis, 2004: xi). They assume the plumbing is there and in good working order, but they do not want to be confronted with it in “regular historical works” (Megill, 2007: 150). If history is to be written in the form of a social science article for organization theory, then the plumbing needs to be exposed for inspection. This means that the tacit practices of “source criticism” (Alvesson & Sköldberg, 2009: 107-116) used to identify and interrogate sources, would have to be made explicit in a dedicated discussion of methods prior to the actual historical account, instead of being obscured in cryptic footnotes (Grafton, 1997).

If we accept that there is a “literary” or “fictive” element in all historical (Megill, 2007: 185) and scientific writing (Bedeian, 1997), then we can see that it takes different forms. Objectivist historians still hold to the “fiction of an objective narrator” (Megill, 2007: 87). But the “rules of verification” in history preclude the fictionalized typicality permitted for organizational case studies, which rest on very different expectations of verisimilitude where researchers are less constrained to put their evidence on the table. As Czarniawska (1999) observes, researchers often present findings for an organization which “may not exist, and yet everything that is said about it may be true,” which is taken to mean that “it may be credible in the light of other texts.” So in a typical real-time, longitudinal, qualitative case study (e.g. Jarzabkowski, Matthiesen, & Van de Ven, 2009), all data that might reveal the identity of the case study organization, such as “specific dates, names, products, and other contextual features,” are disguised in order to preserve anonymity. We are assured that “the nature and temporal sequence of events are faithfully reproduced” (Jarzabkowski et al., 2009: 290-291). However, nothing can be verified from the actual text of the case study.

To clarify the difference between data and sources, we can say that: organization theorists often tell us exactly how their data were constructed for case studies, but offer no clues as to where the sources for the data are located; whereas narrative historians generally tell us exactly where their sources are located, but give no indication of how they found or emplotted them. A typical organizational case study may use archives, but it is predicated upon a “replication logic” (Eisenhardt, 1989), whereby the procedure for constructing the data has to be specified so that it can be replicated to test the findings in another case study. By contrast, a typical narrative history is predicated upon a verification logic, whereby the exact location of sources has to be given so that they can be consulted to verify whether they support the historian’s emplotment. A generalizable contribution to organization theory requires replicable data, even if its

fictionalization precludes verification, whereas a contribution to historiography requires verifiable sources even if it comes in a literary narrative form without explicit theory or methods.

### **Dualism 3: Temporality (Periodization and Chronology)**

Organization theorists recognize that time, or the timing of events, represents “an important contingency factor” that is neglected in “cross-sectional research designs” (Haveman, 1993: 867). The “time elapsed” between specified events in an organization, and the timing of those events in the “organizational life cycle” allows for models that “investigate history dependence” (Haveman, 1993: 867). But these models tend to equate history with time, which means that even distant historical settings are only chosen because a complete data set has been found to test the generalizability of a theory (Haveman, 1993: 869-870), rather than a result of questions arising from historiography. As Aldrich (1999: 205) puts it, in organizational life cycle models, “‘time’ runs on a universal clock rather than being historically situated.” This means that the models “implicitly treat one year in the 19<sup>th</sup> century as equivalent to one year in the 20<sup>th</sup> century. Problems are problems, regardless of the century in which they are encountered.”

In the treatment of time therefore a dualism can be discerned that separates organization theory from history. Dates are obviously a hallmark of most historical writing, but dating an event is not only a matter of specifying its temporal relation to other events in the same account, which could be done by referring to  $t_0$ ,  $t_1$ ,  $t_2$  ...  $t_n$  (c.f. Langley, 1999; Ricoeur, 1990: 154). Instead a date can substitute for a more detailed account of the historical context, which is taken as given depending on the assumed background knowledge of readers (Dray, 1986: 28). In addition, particular years, such as 1865, 1945, or 1968, resonate in national collective memories.

To say that time matters is not the same as saying that history matters. Time often matters for social scientists only in terms of specifying the chronological order of events in an account of processes such as path dependence (Abbott, 2001; Pierson, 2004), whereas history matters to

historians for an understanding of events in their historical context (Tosh, 2008). Time in organization theory is therefore generally abstracted as clock time, or “analytic time” (Pedriana, 2005); that is, as a consistent measure for the sequencing of events. But the historical context is attenuated, and can be chosen without regard to its salience in historiography or collective memory. Historians generally take it as given that events are embedded in what sociologists call “temporal and spatial contexts,” and in “particular social times and places” (Abbott, 1997: 1169). As Sewell (2005: 226-245) points out, in common usage an “historical event” signifies “an occurrence that is remarkable in some way,” while according to his own stricter sociological definition historical events are “cultural transformations.”

The dualism of temporality differentiates chronology, where physical time is taken as constant, from periodization where divisions of social time and space are defined from sources and historiographical context in the process of research and writing. As part of his effort to make organization theory more historical, Aldrich (1999: 206) suggests the possibility of extending evolutionary models to take account of “period effects,” when “historical discontinuity” has an impact on a population of organizations. This leads him to recognize the difficulty of deciding what constitutes a “period,” especially when the boundaries between periods consist of “unique events.” Aldrich neatly summarizes the problem of identifying “discrete segments in history as ‘periods,’” given that “different observers view the same events from diverse perspectives on their significance,” and in practice “period labels” are created on the basis of differing “research objectives and working hypotheses” (Aldrich, 1999: 207).

When divisions of time and space are not taken as given, historians face the continual problem of devising criteria for partitioning the past into “manageable chunks” (Jordanova, 2006: 107). For a named entity, such as an organization, there is always the problem of where to start. It is necessary to distinguish between the beginning and the origin of an organization. A

“beginning consists in a constellation of dated events” (Ricoeur, 2004: 139), that can be confirmed from the sources, whereas the origin or birth of an organization is a mythic event that requires a single, readily identifiable, date and preferably an identifiable founder. This illustrates the problem that events which come to be seen as historical, as opposed to mere occurrences, are typically “composed of a series of events,” with the delimitation of an historical event requiring judgment of what a narrative is attempting to explain (Sewell, 2005: 260-261). Moving from narrative to analysis can be facilitated by a periodization derived from social parameters which remain unchanged, such as rituals or structures (Abbott, 2001: 211). But periodization in history cannot be reduced to chronological clock time as it has to take account of context and historiographical debate.

Organization theorists tend to see “retrospective case histories” as inherently biased (Van de Ven, 1992: 181; Golden, 1992; Eisenhardt & Graebner, 2007: 28), and prone to reinforcing the myths that more disciplined longitudinal analysis can dispel (Hannan & Freeman, 1989: 40). Real-time research may therefore be preferred to historical research because process outcomes are not known when the research commences (Van de Ven, 1992: 181). Teleology cannot be completely avoided when it comes to writing up real-time research, but history is distinguished by an inevitable irony and teleology, as the ending is usually known at the beginning. For example, when we start to read an historical account of an organization we usually know whether that organization still exists. “History appears once the game is over,” as Ricoeur (1990: 157) puts it, and the “retrospective intelligibility” of history cannot be predicted at the time events occur. For historians “temporal distance” is a requirement for deciding which singular events are historiographically significant beyond the subjective perceptions of actors (Lorenz, 2011: 31).

Periodization also reflects the ontological commitment of historians to defining their object in time and space, or more specifically in historical context and place, with the standard

subdivisions of history's specializations being defined by period and geography (Lorenz, 2011). The specification of the object in historical time and place derives from an ontologically holistic view of history, in the sense that history is generally perceived, albeit with increasing irony, as a "singular, unified process of development" (Gunn, 2006: 172), consisting of "the entire human past" that determines or shapes "the human present and future" (Sewell, 2005: 327). This holism lends itself to an epistemological view of history as an unending accumulation of historically specific knowledge that can be integrated within a totality. This is perhaps equivalent to the aspiration for a unified theory in social science.

### **STRATEGIES FOR ORGANIZATIONAL HISTORY**

From our epistemological dualisms we can construct a template that counterposes two stylized forms of history at opposite ends of a spectrum (summarized in Table 1). On one hand, we find a conventional narrative organizational history, with detailed citations to primary documentary sources, and a periodization derived from sources with reference to historiography and the historical context. On the other hand, we have historically informed organization theory, derived from a clearly stated method for constructing a chronological data set from historical sources. Using this template we are able to assess the potential for reconciling epistemological dualisms in alternative strategies for historical research and writing.

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 Insert Table 1 about here  
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We have identified four historical strategies (viz. corporate history; analytically structured history; serial history; and ethnographic history) to highlight the potential for producing theoretically informed "organizational history," by which we mean the history of organizations as such, with a focus on individual organizations rather than fields or populations. Of these strategies, corporate history and ethnographic history are already recognized as

historiographical genres, although our analysis underscores their distinctive characteristics. In addition we have constructed the categories of analytically structured history and serial history not only for the purpose of comparison but also to counter the impression that organizational history can or should be synonymous with any particular strategy.

To illustrate the potential of our four strategies we have selected two exemplars to analyze for each strategy (c.f. Langley, 1999: 695). To facilitate a focused comparison of exemplars we have selected journal articles (Anteby & Molnar, 2012; Cheape, 1988; Childs, 2002; Chuang & Baum, 2003; Freeland, 1996; Jones, 2002; McKinlay, 2002), rather than books, although in one instance we have chosen a key chapter from Chandler's (1962) *Strategy and Structure*, given its classic status in the field. The exemplars for our strategies can be summarized in terms of their approach to explanation, evidence, and temporality (see Table 2), which we expand upon in the synoptic review below.

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 Insert Table 2 about here  
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## **Corporate History**

Organization theorists' reservations regarding organizational archives are understandable given that most research and writing derived from such archives takes the form of corporate history. We define corporate history as a holistic objectivist narrative of a named corporate entity. It is holistic in two senses: first, it generally encompasses the whole history of the entity, or at least it emphasizes continuity of the entity from its founding to the present; and second, it is conceptualized as a contribution to the totality of history, filling an important gap.

The aspiration to produce a holistic continuous narrative for a corporate entity makes it necessary to search an eclectic collection of sources, with primary documentary sources given precedence whenever they are accessible. Survivor bias favors coverage of successful existing



organizations enjoying relative longevity and with sufficient sources available. Corporate history also entails a teleological anticipation of future success, or occasionally failure, of the corporate entity. The focus on a named entity, rather than an event or institution, emphasizes the agency of a series of named individuals, even if corporate history transcends the individual agency of biography. Corporate history therefore represents the form of organizational history that most closely resembles a stylized conventional narrative history, combining narrative with documentary sources and a periodization derived from the corporate entity itself.

An important characteristic of corporate history, from the point of view of historical epistemology, is its objectivist narrative literary form, which constitutes a constraint on the ability or willingness of historians to provide a reflexive account of their perspective (Megill, 2007: 103). We find an inadvertent expression of this constraint in a well-known article by a British economic historian, Coleman (1987), who argues that the only way historians can normally gain access to the archives held by extant business organizations “is to be commissioned to write company histories” (Coleman, 1987: 142; for a similar argument see Tosh, 2010: 75). As a result, Coleman (1987: 142) maintains, no matter how “scholarly, accurate, fair, objective and serious that company history is, its content is necessarily shaped by the need for the author to give his client something approaching what he wants. And what he normally wants is a narrative history ... warts and all maybe,” but “*not* a comparison” with other organizations, and “*not* an analysis” of how the organization’s “behavior supports or refutes the theories of X, Y, or Z.” Coleman’s (1987) comments reveal an interesting paradox, which is that the objectivist economic historians who are most likely to write a commissioned corporate history are in many cases reluctant narrativists who are most unlikely to be reflexive about questions of emplotment.

The self-imposed constraints of objectivism prevent corporate historians from reflecting on their own imposition of a narrative. This becomes obvious when considering the role of founders in corporate history. Most corporate historians would concur with Schein's (1985) view that an organization is created by a founder whose actions shape the culture of the organization. But if it is stated at all in a corporate history, rather than simply assumed, this view is expressed as a self-evident finding, rather than a theoretically contested concept (e.g. Martin, Sitkin, & Boehm, 1985). Any discussion of the "founder's role" as a mode of emplotment in corporate history is precluded by the objectivist presumption that the plot has been found rather than imposed. Objectivism is therefore a *sine qua non* for corporate history, and whether commissioned or not, objectivism constrains corporate history from reflecting on the imposition of a narrative, such as a founder-centered emplotment, or the possibility of any counter-narrative.

As organization theorists recognize, history can confer legitimacy on organizations (Suddaby & Greenwood, 2005; Suddaby et al., 2010; Linde, 2009: 85). The objectivist view is that legitimacy is more likely to be secured from a commissioned corporate history if it strives for "objectivity" because "reviewers and the general reader are inherently skeptical about the objectivity and balance in 'management-sanctioned' corporate histories" (Campion, 1987: 31). As a prominent academic historian who wrote a commissioned history of the Rothschild bank (Ferguson, 1998b), Niall Ferguson (1998a) makes the point that neither his own reputation nor the Rothschilds' would have been enhanced if he had written a "whitewash."

Geoffrey Jones, a professor of business history at Harvard Business School and the author of a commissioned corporate history of Unilever, the Anglo-Dutch multinational (Jones, 2005), has consistently made a distinction between "critical," "objective," commissioned histories, such as his own, and the numerous public relations company histories, which may be "readable," in a popular sense, but lack "scholarly depth" (Jones & Sluyterman, 2003: 112;

Amatori & Jones, 2003: 3; Jones, 2005: v, 323). Jones (2012: 232) also appears to be a somewhat reluctant narrator, who advocates more critical use of archives, including the construction of databases for hypothesis testing. For his history of Unilever, Jones (2005: v) was granted “unrestricted access to archives and people,” and his reputation appears to have allowed him to stretch the limits of what a commissioning organization might expect. His book is divided into two parts, the first offering a chronological history and the second an exploration of key themes such as brands, human resources, and corporate culture. These themes are obviously replicable and can be envisaged as representing a cumulative contribution to a thematic historical totality (c.f. Jones & Zeitlin, 2008).

As a by-product of his commissioned history, Jones’s (2002) article on Unilever’s subsidiaries in the United States (1945-1980) addresses their poor performance in relation to theories of multinational enterprise. There is a discernible narrative in the article and as an accomplished historian, with the benefit of temporal distance, Jones is able to reveal information which actors at the time were not aware of. However, even in the context of a theoretically informed article — and presumably with Jones freed from the constraints of his commission — there is no discussion of methods such as we would expect in organization theory. Even though Jones “draws extensively on the confidential business records” held by Unilever, and claims to provide “rich new empirical evidence” on “the functioning of multinationals” (Jones, 2002: 438, 478), with copious citations to internal committee minutes, memos, and reports, there is no dedicated discussion of sources, and certainly no caveats regarding the disadvantages of organizational archives.

While Jones deliberately stretches the constraints of narrative, Cheape (1988) was distracted from the conventional concerns of corporate history while researching his commissioned history of Norton, the American manufacturer of grinding wheels and abrasives

(Cheape, 1985). His discovery of “unusual inside data” in the archives concerning the manager of Norton’s German subsidiary from 1937 to 1959 prompted Cheape to explore the historiography of relations between business and the Third Reich between 1933 and 1945. Although Cheape’s (1988) article does not have a recognizable methods section, he does include a brief account of his approach to source criticism through his inter-temporal comparison of letters and reports written in Germany before 1942 and those produced for the manager’s denazification hearings in 1946. Cheape realized the significance of his find in the archives from his awareness of the historical context and historiographical debate over the role of business in the Third Reich (see e.g. Nicosia & Huener, 2004), a debate which historians have criticized business schools and organization theorists for ignoring (Berghahn, 2004: 139).

Corporate history demonstrates therefore the difficulty of reconciling our epistemological dualisms. Jones’s (2002) move towards replicable thematic analysis is presented as if it is the only alternative to a common sense founder-centered narrative. But thematic analysis tends to suppress historiographical debate, such as that over the role of business in the Third Reich, or the epistemological significance of contingent finds in the archives, such as Cheape’s (1988). Organization theorists might suspect that commissioned corporate history lacks balance (c.f. Khurana, 2007: 388), and there is obviously an ideological bias in favor of particular types of academic historian, such as economists who see entrepreneurs as central to economic progress (Church, 1996). It should be noted, however, that many high profile corporate histories, some of which stretch our definition of the strategy, were *not* commissioned or authorized, and only use sources in the public domain (e.g. Delamarter, 1986; Pendergrast, 2000; Moreton, 2009). But in terms of historical theory (e.g. Novick, 1988; White, 1987) it can be argued that the ideological content of corporate history is contained in its objectivist form and founder-centered emplotment, which would be compromised by any hint of distortion or lack of independence.

The content of the form of corporate history is inimical to explicit theoretical considerations of historical epistemology.

We can see from the discussion above that the word “objectivity” tends to be used as a polemical device, with little analysis of its meaning (Megill, 2007: 112). We tend to agree that judging whether a work of history is objective or not is “an *empty* observation” (Novick, 1988: 6). We can of course observe whether a history puts its evidence “on the table” by following the rules of verification, as do all of the corporate histories we have cited, and then assess whether the sources cited are compatible with the emplotment. Whether or not holism and objectivism originate from commissioning, they are pervasive in narrative corporate history, most of which is not commissioned. The sheer volume of corporate history, in books and academic articles, makes it appear as if only a particular kind of narrative can be constructed from organizational archives, one that is of relatively little interest for organization theorists except as an object of narrative analysis. In order to dispel that impression therefore we need to identify and assess alternative strategies for using and explaining the abundant sources available in organizational archives.

### **Analytically Structured History**

On entering an organizational archive organization theorists confront a choice of “whether to theorize processes within a narrative or within a generalizing, analytic schema” (Whipp & Clark, 1986: 17-18). Instead of lapsing into either a common sense founder-centered narrative, or an analysis purged of narrative, we propose that it is possible to situate historical research and writing “on the bridge between narrative and analytic schemas.” A narrative can be conceptualized as analytically structured history prior to entering an archive. For example, from a “structure-event-structure perspective,” the periodization is derived from the sources, rather than imposed from an external historical context, and events in an organization constitute the

turning points between one period and the next, “when novel elements are introduced and subsequently institutionalized in the new structure” (Whipp & Clark, 1986: 19).

As a classic narrative account of organizations derived from primary documentary sources, Chandler’s *Strategy and Structure* (1962) can be seen as an exemplar of analytically structured history, and remains one of the best starting points for understanding historical research in organization theory (Kipping & Üsdiken, 2008: 113). Chandler’s historical narratives are in no sense holistic corporate histories; they are instead highly focused and based on a careful selection of sources. Nevertheless, his narratives have the literary quality expected from a well-written corporate history, with an eclectic range of sources marshaled to construct a seamless and satisfying narrative, and with a large number of actors named (Stinchcombe, 1990: 109). Although Chandler is no less objectivist than most corporate historians, *Strategy and Structure* represents an important break with corporate history because named corporate entities are subordinate to concepts.

According to Stinchcombe (1990: 104), if Chandler had submitted an article on the multidivisional structure to a leading journal in management and organization theory, “a page or two about the histories of Du Point, General Motors, Jersey Standard, and Sears might have been in the original draft as motivation, to be cut by the editors as not science but anecdote.” But this dismissal of Chandler’s historical narratives assumes that it was obvious what strategy and structure meant before Chandler provided historical illustrations for them. An interesting historiographical question is whether it was the extended descriptions in Chandler’s historical narratives that provided us with the enduring definitions of strategy and structure. We maintain that Chandler’s narratives established the causal link between strategy and structure, and his long descriptive sections were not anecdotal but necessary for constructing these concepts. Chandler’s narratives are thus emplotted by the analytic constructs of strategy and structure.

Chandler himself gave few clues as to his own theory of history or actual working methods. We have to rely on commentators for an exposition of his functionalist theory of history (Mayhew, 2009; Roy, 1990; Stinchcombe, 1990), and use of sources (McKenna, 2006), as well as a close reading of the text itself. Chandler's (1962) chapter on General Motors (GM) is probably the best illustration of analytically structured history and is the focus for later historiographical debate (Freeland, 1996). Chandler uses a range of narrative or secondary sources to recount GM's strategy of diversification up to 1920: "annual and other corporation reports, government documents, magazine articles, and the few pertinent business histories and biographies" (Chandler, 1962: viii). He accepts that changes in strategy can be gleaned from a general survey of these sources, but maintains that: "Only a study of a company's internal business documents and letters can accurately reveal the details of structural reorganization" (Chandler, 1962: 380). In other words, Chandler only uses primary social documents, such as minutes from GM's Board of Directors' meetings, to narrate an *event*, the structural reorganization of GM during 1920 and 1921.

Freeland's (1996) analytically structured history starts where Chandler's (1962) narrative leaves off, with the adoption of the multidivisional structure by GM in 1921. Freeland (1996: 497) argues that for most of the forty-year period from 1924 GM did not have "a textbook M-form," and he highlights the differences in operation of what was ostensibly the same structure in a series of defined periods. Unlike Chandler, however, Freeland (1996: 493) outlines his theoretical orientation at length and gives a brief account of his methods, highlighting his use of newly available archival documentary sources, especially the correspondence between Alfred Sloan and the owners of GM. He addresses the problem of bias in accounts by executives, but argues that their consistency over time is an indication of reliability. Freeland presents a sparser linear narrative for GM over a longer period than Chandler by narrating the organizational

structure as a “quasi-character” at the expense of named actors or events. Freeland’s writing strategy retains narrativization, but by focusing on the clearly stated periods between the turning points he places much less emphasis than Chandler on a narrative account of events.

Analytically structured history thus uses analytic constructs — such as “strategy” and “structure” — to search archival sources, enabling the construction of a narrative of structures and events that may not even have been perceived as such by actors at the time. Hence, although analytically structured history retains narrative as the main form of explanation, it is driven by concepts, events, and causation, whereas corporate history focuses on a corporate entity and leading individuals. Analytically structured history may draw on secondary sources and narrative texts, but that is not the same as a reworking or an analysis of the narratives already contained within those sources. Analytically structured history is therefore a form of narrative construction from organizational archives, not merely the reconstitution of a narrative from narrative analysis. We suggest that historically oriented theories of organization — such as new institutionalism, institutional work, and institutional logics — are amenable to analytically structured history, with the construction of historical events from organizational archives providing a potential focus for actors and agency. Self-consciously emplotted analytically structured history is also more defensible than corporate history against objections to narrative construction.

### **Serial History**

For historical theorists who focus on the epistemological status of narrative, “serial history” represents a standard alternative to narrative history (Clark, 2004: 121; c.f. Langley, 1999: 691). Serial history is predicated upon finding a series of “repeatable facts” (Ricoeur, 1990: 106) that can be analyzed using replicable techniques, usually in a predefined set of chronologically continuous sources, if not an actual quantitative data set. As the preferred strategy for history in organization studies, serial history constantly threatens to eclipse narrative



— to use Ricoeur’s (1990) term — through continual advances in methods such as event history analysis. However, while serial history does not necessarily preclude analysis of primary social documents derived from organizational archives, such as minutes of meetings, these sources would require laborious processing in order to construct “repeatable facts” that could be usable as data. Secondary data sets may occasionally be found in organizational archives (Payne, Finch, & Tremble, 2003), but research using such archival data makes no real claim to be historical in our terms (e.g. Dokko, Wilk, & Rothbard, 2009). It is hardly surprising therefore that we have found little or no serial history that attempts, in our epistemological terms, to explain the evidence found in a particular organizational archive. Hence, these rich sources, which are a mainstay for corporate history and analytically structured history, remain largely unexplained by the dominant historical research strategy in organization theory.

Serial history mainly focuses on organizational fields or populations, rather than individual organizations. Occasionally, as Chuang and Baum (2003) demonstrate, data covering the “life histories” of multiple organizations can be constructed from the archive of an association, licensing, or regulatory organization, rather than the archives of the organizations that are the object of investigation. Chuang and Baum compiled data on 557 nursing homes operating in Ontario between 1971 and 1996 from “two archival sources: the Ontario Ministry of Health (MOH) licensing records and the *Ontario Hospitals’ Association (OHA) Directory*” (Chuang & Baum, 2003: 42). They used their data on nursing homes to test a series of hypotheses regarding the adoption of common names for components of multiunit chains. What is interesting from our perspective is that although Chuang and Baum’s serial history represents a valuable contribution to the growing literature on organizational name changes, the subordination of narrative to analysis is such that there is no discussion of the history of naming for nursery homes, and the actual names are not revealed. We are only told whether nursing

homes shared their names with others that identified them as part of a chain. And finally the period 1971 to 1996 appears to have been chosen for the availability of chronologically continuous archival sources rather than any historiographical significance.

For a more interpretive form of serial history, “content analysis of archival documents composed of qualitative textual data” (Sonpar & Golden-Biddle, 2008: 795) can be applied to narrative sources in an organizational archive. As an example of such serial history, Anteby and Molnar’s (2012) research stands out for its content analysis of 309 internal bulletins from the French aeronautics firm Snecma, covering nearly 50 years from 1953 to 1999. Anteby and Molnar use their data to show how there was a “structural omission” of contradictory elements from the firm’s official historical record. This demonstrates how corporate cultural communications, such as internal bulletins or company magazines, represent primary narrative sources that are amenable to quantitative narrative analysis in serial history. These sources are part of an organizational archive, since they are clearly generated by the organization itself. As Anteby and Molnar (2012: 521) point out, the internal bulletins they analyzed can reliably be taken to represent an official view because they were “approved by Snecma’s top management,” which turns the alleged weakness of such sources into a strength. It is also worth noting that Anteby and Molnar’s historical research represents a novel contribution from organization theory to the field of collective memory studies, in which both serial history and organizational history have been neglected (Rowlinson, Booth, Clark, Delahaye, & Procter, 2010; c.f. Olick, Vinitzky-Seroussi, & Levy, 2011).

### **Ethnographic History**

For our final strategy, ethnographic history, we note initially how organizational ethnography has been defined by three criteria: first, ethnographic methods, with a requirement for observation and “talking to people”; second, a narrative form of writing; and third, an

“ethnographic sensibility that would convince the reader of the trustworthiness of the author” (Yanow & Geuijen, 2009: 254). The emphasis on fieldwork and the construction of data for generating theory reflects the need to gain legitimacy in organization studies (Cunliffe, 2010; Zickar & Carter, 2010). As a result organizational ethnographers generally neglect studies of culture in history, fiction, and literary criticism (Van Maanen, 1988: 11). Nevertheless, we can deploy the criteria used to define organizational ethnography to consider its similarities and differences with ethnographic history.

Historical researchers obviously cannot be present, with notebooks, tape-recorders, and cameras, at the events they describe, but occasionally they discover a cache of sources from witnesses that can “tell us what it was like to be there” (Stone, 1979: 14). More importantly historians have interpreted cultural anthropology, and especially Geertz’s (1973) notion of “thick description,” to mean that culture can be understood as a text (Gunn, 2006: 63), with an emphasis on how texts can be read rather than as a method for constructing texts. Van Maanen (1988: 76) claims that ethnographers have to construct their texts from the field, whereas the texts used by historians and literary critics “come prepackaged.” Even if it were true that historical sources came “prepackaged,” and anyone who has ever worked on an organizational archive will know that they do not, it is not clear why the interpretation of cultures should privilege texts constructed by ethnographers. Besides, historical researchers often enter into relationships with regard to their sources comparable to those of an ethnographer entering the field, especially when the documents are held in the “living archive” of an extant organization (Hill, 1993: 54; Howell & Prevenier, 2001), so the contrast with fieldwork may be overdone.

In fact, ethnographic history — also known as ethnohistory, anthropological history (Green & Troup, 1999), or microhistory (Clark, 2004: 75-79) — is now widely accepted by historians, reflecting the rise of cultural history (Megill, 2007: 203). The most celebrated

example of ethnographic history is Le Roy Ladurie's (1980) international bestseller, *Montaillou* (Abbott, 2004: 152-153; Sewell, 2005: 69; Stone, 1979), which used the records of the Inquisition to interpret the culture of medieval peasants. As an example of reading sources against the grain, Le Roy Ladurie was not so much interested in the Inquisition, or the nature of the heresy being investigated among peasants, but rather in using the Inquisition's records as if they were ethnographic field notes recording peasant culture.

If we accept that ethnography consists of a perspective as much as a method, then we can see that organizational archives contain sources that can be read as texts for an interpretation of culture. But in comparison to corporate history, ethnographic history requires a self-consciously "angular" theoretical perspective (Megill, 2007: 110-111). Childs (2002), for example, adopts a Bakhtinian (Bakhtin, 1968) perspective in his account of a gold mine operated by the British-owned St John d'el Rey Mining Company in the Brazilian tropics during the nineteenth century. Childs focuses on a particular ritualized display of power in which "on Sundays nearly 1,500 slaves from the mine, separated by sex, lined up in columns in front of the *Casa Grande* (big house) for a ceremony called the *Revista* (review)" (2002: 43). Like an ethnographer, Childs interprets the meaning of this ritual as a way to explore broader social relations between masters and slaves. Following Mikhail Bakhtin's emphasis on the carnivalesque in early modern Europe (Gunn, 2006: 68), Childs is alert to the pride and shame of the slaves and in particular to any opportunity that presented itself for them to ridicule their masters.

As a historian, Childs is interested in the historical legacies of slavery and racism in shaping the modern world, which is largely neglected in organization theory (Cooke, 2003). While Crane (2013) has drawn attention to the role of contemporary organizations in the prevalence of "modern slavery," Childs informs us of the seemingly modern organization of labor in the "industrial slavery" at the gold mine in Brazil. This involved up to 1,700 slaves, most

of them rented from other slave owners, “working at numerous individualized tasks as miners, borers, strikers, surface laborers, carpenters or masons, but rarely in the large work gangs common to plantation slavery” (Childs, 2002: 49). Childs’ primary sources are from the St John d’el Rey Mining Company Archive, held by the University of Texas at Austin, which Childs reads against the grain. In response to criticism in the British press for its use of slave labor, long after the abolition of slavery by Great Britain in 1833, the directors of the St John Company commissioned an “independent” report on the condition of “the Negroes.” The fifty-page *Circular to the Proprietors of the St John d’el Rey Mining Company* was sent out to stockholders in 1850, assuring them of the “Humane and generous ... measures already adopted ... to render them [the slaves] as contented and happy as men can be expected to be, whose lot is to earn their bread by the sweat of their brow” (quoted by Childs, 2002: 48). The narrative text of the *Circular* is one of Childs’ main primary sources, along with the company’s Annual Reports and social documents such as the Minutes of Board Meetings. But Childs’ angular theoretical perspective is nothing like an objectivist narrative corporate history explaining the longevity or performance of a British mining company operating in South America.

As an ethnographic history, McKinlay’s (2002) analysis of clerks’ careers in the Bank of Scotland before the first World War relies on documentary sources found in an organizational archive. But whereas Childs follows Bakhtin, McKinlay follows Michel Foucault (1977) into the archives. McKinlay points out that his reading of the modern banking career is very different to a “conventional” or corporate history. In his description of how the clerks were disciplined by the emerging concept of a career, McKinlay’s main sources are staff ledgers, in which annual appraisals were recorded. While searching the bank ledgers, however, McKinlay found hundreds of drawings hidden in a secret “Ledger 99,” produced by a clerk, Robert Shirlaw, who worked for the bank from 1899 (aged 16) until his death in 1930. A talented cartoonist, Shirlaw

caricatured the bank's employees and their work situations, regularly depicting the bank's manager as Napoleon (Figure 1 McKinlay, 2002: 603). McKinlay's analysis brings the clerks' occupational world to life with a series of micro-stories pieced together from ledgers that illustrate, for example, the bank's tight surveillance and control of behavior.

This returns us to the definition of organizational ethnography as narrative. Organizational ethnographers are understandably anxious not to be constrained by the "succinct textual form" that prevails in organization studies, and therefore they emphasize the narrative aspect of their own writing (Yanow & Geuijen, 2009). But in the context of history, and in comparison to corporate history, ethnographic history represents a conscious refusal to impose a plot in a move towards a "non-event worthy history" (Veyne, 1984: 54), one that is wary of narratives and universalizing theories which make historical actors appear too familiar. With their "angular" theoretical perspectives (Megill, 2007), both Childs and McKinlay distance themselves from the dominant metanarratives that emphasize functional or economic logic in the demise of slavery and the rise of modern careers. Childs' account in particular is thematically structured, exploring, for example, the role of overtime and religion in the slaves' Sunday routines. Routines and rituals of power are presented as relatively constant within an extended period starting with the commencement of operations by the St John Company in the 1830s and ending with the emancipation of the slaves during the 1870s (Childs, 2002: 62). Even if written as a micro-story, ethnographic history tends to avoid the implication that the events recounted are "historical" in the sense of changing the course of history.

Like much historiography, then, ethnographic history owes a lot to the serendipity of finding sources (Jordanova, 2006: 37; Ginzburg, 1992[1976]: xi). But ethnographic researchers recognize the significance of the intriguing sources they find in organizational archives because they know what kind of sources they are looking for (McKinlay, 2013). Researchers writing a

corporate history would not normally look for such sources and, even if they found them, would probably discard them as a distraction. Recognizing the significance of such finds in an archive therefore requires an “ethnographic sensibility,” and an “angular” theoretical perspective.

## **DISCUSSION**

We have demonstrated that corporate history, analytically structured history, serial history, and ethnographic history are as different from one another as other research strategies in organization studies. Therefore, if history matters for organization theory, it makes no sense to try to find a unified ontological or epistemological foundation, let alone a unitary “historical method” for organizational history. The epistemological dualisms in explanation, evidence, and temporality that we set out in the first part of this article highlight the similarities and differences between alternative strategies for organizational history (see Table 3). We have identified these strategies with the intention of demonstrating that serial history, with its replicable procedures for constructing data, is not the only alternative to narrative corporate history. Ethnographic history also represents an alternative to the narration of historiographical events in response to the impositionist objection to narrative. And analytically structured history offers the possibility of constructing historical narratives using theories of organization that can be defended against social scientific objections to narrative construction.

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Insert Table 3 about here  
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We have made the case that organizational archives are not merely an under-utilized source of data, in historical terms they also represent largely unexplained evidence. The sheer volume of corporate history, whether commissioned or not, suggests that many organizations consider this evidence worthy of retention and explanation. However for the epistemological reasons we have given, we do not believe that we should leave it to corporate history to explain

the evidence in organizational archives. We would like to promote greater use of organizational archives using alternative strategies for research and writing. This will require epistemological reflexivity in order to counter reservations regarding the use of organizational archives in organization theory.

We should point out that much material from organizational archives is in the public domain, as was the case for several of our exemplars (Anteby & Molnar, 2012; Chandler, 1962; Childs, 2002; Freeland, 1996), which means they do not require special permission from an organization before they can be consulted. However, having gained access to an organizational archive organization theorists then need to know what to look for. Corporate history tends to follow the narrative embedded in the “conventional hierarchy” of an organizational archive (McKinlay, 2013), which is partly why corporate historians are unable or unwilling to write up their theory and methods. Analytically structured history and ethnographic history, though, require a degree of epistemological reflexivity, as is expected from interpretive organization theorists (Alvesson & Sköldbberg, 2009), and which our epistemological dualisms facilitate.

An understanding of historical theory is also desirable if organization theorists are to become more sophisticated consumers of historiography, even if they do not intend to conduct archival historical research themselves. It seems unlikely that an organization theorist would be commissioned to write a corporate history, nevertheless, corporate histories represent valuable secondary sources, which offer vicarious access to a wealth of primary sources. When we read corporate histories, therefore, we need an appreciation of how they are emplotted by their objectivism and founder-centered narratives.

Epistemological reflexivity is necessary because, like most non-historians who rely on secondary sources, such as corporate histories, or prepackaged primary sources (Jordanova, 2006: 38; O'Sullivan & Graham, 2010), organization theorists often use historiography as if it



represents an unproblematic “historical record.” Many of the best known histories in organization studies, such as Chandler’s *Visible Hand* (1977) or *Scale and Scope* (1990), are in fact masterpieces of historiographical synthesis, which rely mainly on secondary sources, such as corporate histories (Kobrak & Schneider, 2011). We cannot expect organizational researchers to refer constantly to their historical writing as an interpretation of commentaries on the traces of past events. However, if they did so more often this would lead to a greater appreciation of the craft skills required to interpret primary sources.

A more fundamental concern is that organization theorists, in comparison to theorists from other fields, have little to say about the significance of historical events for understanding our present and future. Take, for example, Sofsky’s “thick description” of “power in the concentration camp” in *The Order of Terror* (1999), which we characterize as an ethnographic history. Lammers’ (1995) extended review praised the “exceptional qualities” of the book, but also noted that Sofsky makes no mention of organization theory, because organization theory has nothing to offer by way of research concerning concentration camps. There are many reasons why this might be the case. Despite its universalistic claims organization theory is mostly written in English (Strati, 2000: 130), and research on concentration camps would require a command of German as well as the vast historiography of the Holocaust. It would be unseemly to ask how studying the Holocaust could advance organization theory (Clegg, 2002; c.f. Friedländer, 1992). But if understanding the past is central to our historical human condition (Ricoeur, 2004), then we should ask how organization theory might help to explain singular historical events. In other words, it may be self-defeating to insist that organization theory is synonymous with the relentless subordination of idiographic history to nomothetic social science.

A clear conclusion from our epistemological dualisms and alternative research strategies is that there is no prospect of a unified field of organizational history. History is no less

fragmented than organization theory, and historical theorists (e.g. Megill, 2007) are no less suspicious of any attempt to impose paradigm consensus than organization theorists (Van Maanen, 1995). Nevertheless, if we are to realize the potential for a plurality of historical perspectives in organization theory we should consider the prospects for dialogue with historians, as historical sociologists such as Sewell (2005) have done. In order to facilitate such a dialogue we should try to recognize what it is that organization theorists know, or need to know, and what it is that historians know, or need to know. Whereas organization theorists need to understand theory and methods, historians have to know their historical contexts and sources. We cannot therefore regard historians simply as untrained theorists awaiting analysis to replace their narratives or replicable methods for constructing chronological datasets.

We are aware that historians tend to dismiss theoretical interventions from anyone who has not “dirtied their hand in the archive” (Fulbrook, 2002: 25), so we should stress that our strategies are partly derived from reflection on our own experience of theoretically informed historical research and writing (Decker, 2010; Hassard, 2012; Rowlinson, 1988). Even though we would like to encourage organizational researchers to venture into organizational archives, we recognize that most of us are restricted to examining the relatively recent past by our preferred methods, as well as our limited knowledge of historical contexts and sources. Only a few organization theorists have looked at organizations before the nineteenth century (Kieser, 1987, 1989; Newton, 2004; Ruef & Harness, 2009), and the further back we go the more dependent we are on historiography and an appreciation of how historians work. Historical sociologists looking at the Reformation (Wuthnow, 1989), for example, know that they need an appreciation of how historians work with sources if they are going to read and theorize from historiography.

Finally, we should note that historians now seem more willing to articulate and share their knowledge of the craft skills required in organizational archives (see e.g. Adorisio & Mutch, 2013; Bucheli & Wadhwani, 2013). McKenna's (2006) revelations of Chandler's research in the archives of General Motors, along with McKinlay's (2013) intriguing account of how he traced the books and documents ordered by Foucault in the *Bibliothèque Nationale*, tell us more than Chandler or Foucault themselves did about their working methods. However, before we decide to follow Chandler or Foucault into organizational archives we need to know which of their very different kinds of history best reflects our own theoretical stance, and for that we need more than a methodological toolkit. We have signposted some of the philosophers of history and historical theorists who can help us to discover our own reflexive theoretical stance in relation to history. Our exposition of the epistemological dualisms of explanation, evidence, and temporality, as well as our identification of corporate history, analytically structured history, serial history, and ethnographic history as alternative strategies for research and writing organizational history, represent a contribution towards mutual understanding between organization theorists, historical theorists, and practicing historians.

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**TABLE 1**

**Epistemological Dualisms**

	<b>Stylized narrative organizational history</b>	<b>Stylized historical organization theory</b>
<b>Explanation</b>	<b>Narrative</b> of logically and chronologically related events organized by a coherent plot.	<b>Analysis</b> of relationships between concepts and categories; e.g. 2 x 2 matrices of variables.
<b>Evidence</b>	<b>Sources</b> cited from an extensive search of multiple documents and texts with verifiable locations in archives. Verisimilitude through verification logic.	<b>Data</b> constructed from specified replicable procedure for analyzing a pre-defined and delimited set of sources. Verisimilitude through replication logic.
<b>Temporality</b>	<b>Periodization</b> of events as defined by actors or historiography in historical time derived from historical context and sources.	<b>Chronology</b> of predefined regular occurrences, with sequences measured against clock/analytic time; e.g. event history analysis.

**TABLE 2**  
**Exemplars of Strategies for Organizational History**

<b>Strategies</b>	<b>Exemplars</b>	<b>Explanation</b>	<b>Evidence</b>	<b>Temporality</b>
<i><b>Corporate history</b></i>	Cheape (1988)	<b>Narrative</b> of Norton company in Germany during Third Reich	Primary documentary and narrative <b>sources</b> , company letters and reports, interviews	Stated <b>periodization</b> 1933-1945 derived from historical context
	Jones (2002)	<b>Narrative</b> of Unilever's performance as foreign MNC in USA	Primary documentary <b>sources</b> , internal company committee minutes and reports	Stated <b>periodization</b> 1945-1980 derived from sources
<i><b>Analytically structured history</b></i>	Chandler (1962) ch. 3	<b>Narrative</b> of strategy and structural reorganization at GM, emergence of M-form	Selected primary documentary <b>sources</b> for structure, secondary or narrative sources for strategy	1920-21 ( <b>periodization</b> not stated) derived from sources
	Freeland (1996)	<b>Narrative</b> of successive organizational structures at GM as corrupted M-form	Primary documentary and narrative <b>sources</b> , letters from executives to shareholders	Stated <b>periodization</b> 1924-1958 derived from sources
<i><b>Serial history</b></i>	Chuang & Baum (2003)	<b>Analysis</b> of name changes for nursing homes in multiunit chains	<b>Data</b> compiled from archives of licensing organization and associations of nursing homes	Stated <b>chronology</b> 1971-1996 derived from complete data set
	Anteby & Molnar (2012)	<b>Analysis</b> of "structural omission" in official history of French firm Snecma	<b>Data</b> constructed from content analysis of primary narrative sources: internal bulletins	Stated <b>chronology</b> 1953-1999 derived from complete data set
<i><b>Ethnographic history</b></i>	Childs (2002)	<b>Analysis</b> of slaves' routines and rituals of power at Brazilian gold mine	Primary documentary and narrative <b>sources</b> , e.g. board minutes, circular to shareholders	1834-1879 derived from sources ( <b>periodization</b> not stated)
	McKinlay (2002)	<b>Analysis</b> of Scottish bank clerks' careers with illustrative micro stories	Primary documentary and narrative <b>sources</b> , internal bank staff ledgers and published texts	Stated <b>periodization</b> 1894-1913 derived from sources

**TABLE 3**

**Examples of Strategies for Organizational History**

	<b>Strategies</b>			
<b>Dualisms</b>	<b>Corporate history</b>	<b>Analytically structured history</b>	<b>Serial history</b>	<b>Ethnographic history</b>
<b>Explanation</b>	Narrative (corporate entity)	Narrative (conceptual construct)	Analysis	Analysis
<b>Temporality</b>	Periodization	Periodization	Chronology	Periodization
<b>Evidence</b>	Sources	Sources	Data	Sources